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Ontario's Overnight Cultural Tourists - 1998

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HIGHLIGHTS

- In 1998, overnight visitors from across Canada and around the world who participated in cultural activities in Ontario accounted for 16.5% (or 6.5 million visits) of the province's total overnight visitors.

- Almost half (48.8%) of Ontario's overnight cultural visitors came, in 1998, from Canada, over one third (36.1%) from the United States and 15.1% came from overseas countries.

- Overnight visitors from Ontario, Quebec and Manitoba had a low rate of participation in cultural activities in Ontario, while Americans and overseas visitors had a much higher rate of participation in cultural activities than Ontarians. As a result Americans and overseas visitors accounted for a much higher share of overnight cultural visitors than they did of all overnight visitors in Ontario. In general, the further away a visitor to Ontario came from, the higher the chance that he/she will participate in cultural activities.

- Ontarians' low participation rate in cultural activities in the province appears to be the result of a "familiarity" syndrome, as well as the fact that the destinations that Ontarians choose within the province are primarily outdoors destinations and not "cultural" destinations. Low participation rates in cultural activities by its own residents were not unique to Ontario, but were also observed among the residents of all other Canadian provinces when they took trips in their own province.

- On average, Ontario's overnight cultural visitors spent 4.52 nights in the province in 1998, or 43.5% more than what all overnight visitors to the province spent on average (3.15 nights). As expected, overnight cultural visitors from overseas countries stayed the longest (with UK and Germany having the longest lengths of stay among overseas countries), followed by Canadians and then Americans.

- The overwhelming majority of the overnight cultural visitors from the United States and Ontario were in the province for a getaway trip (1-3 nights).

- Although overnight cultural visitors accounted for 16.5% of Ontario's overnight visitors, because of their longer length of stay, they accounted for 23.7% of all the nights spent in the province.

- Compared to other overnight visitors, overnight cultural visitors had a much higher incidence of travel during the summer and a much lower incidence of travel during the winter and fall. The majority (50%) of Ontario's overnight pleasure visitors travelled in the province during the July-September period (3rd quarter).

- Most of Ontario's overnight cultural visitors (63.5%) came to the province primarily for pleasure. However, a quarter of them were in Ontario primarily to visit friends or relatives and a bit over 10% were on corporate or personal business trips.

- Among Ontario's main overnight cultural markets, Ontarians had the highest incidence of travel in Ontario during the first calendar quarter (13.9%), U.K. visitors had the highest

incidence of travel during the second calendar quarter (30.8%), Wisconsin visitors had the highest incidence of travel during the third calendar quarter (76.1%) and New York visitors had the highest incidence of travel during the fourth calendar quarter (33.8%). Overnight cultural visitors from Canada accounted for the highest proportion of Ontario's cultural visitors during all calendar quarters, with the exception of the fourth quarter where they were tied with the Americans.

- The largest proportion of the overnight cultural visitors in Ontario travelled alone (42.9%), followed by cultural visitors in travel parties of two (38.8%). The incidence of travelling with no companions was the lowest among American overnight cultural visitors (only 28.1% of the American overnight cultural visitors travelled alone in Ontario) and the highest among Canadians (51.7%).

- Overnight cultural visitors travelled in Ontario mainly without children under the age of 15. Germans had the lowest incidence of travelling with kids (5.9%) and visitors from Ohio had the highest (24.5%).

- Compared to other overnight visitors, overnight cultural visitors had a much higher incidence of utilization of commercial roofed accommodation (34.9% vs. 27.6% of their respective person nights), with Americans having the highest incidence of commercial roofed accommodation among all origin groups.

- Overnight cultural visitors were twice as active as other overnight visitors, with overnight cultural visitors from overseas countries being the most active. Sightseeing and shopping were almost as popular activities among Ontario's overnight cultural visitors as cultural events were.

- The trips that brought overnight cultural visitors to Ontario had primarily an urban orientation. As such, Metro Toronto was the top region visited among overnight cultural visitors, accounting for 34.7% of them. Festival Country was the second most popular region visited by overnight cultural visitors (28.3%), followed by Ontario East (20.3%).

- The expenditures of overnight cultural visitors accounted for 30.5% of the total spending in Ontario by all overnight visitors, or $2.8 billion. Overall, overnight cultural visitors had an average spending per person visit that was twice as high as that of all overnight visitors ($425 vs. $231).

- Ontario residents had the lowest average spending per overnight cultural visit ($186), as well as per overnight person night ($53). Overnight cultural visitors from the U.S. had an average spending per person visit that was twice as large as that of Ontarians' ($412), while overseas overnight cultural visitors had an average spending per person visit that was almost six times larger than that of Ontarians' ($1,120), partly because of high transportation costs to reach Ontario.

- Overnight cultural visits in Ontario decreased by –7.9% between 1994 and 1996, and then increased by 3.2% between 1996 and 1998. However, compared to 1994, the number of overnight cultural visitors in Ontario in 1998 was still down by -5.0% (from 6.9 million visits in 1994 to 6.5 million visits in 1998). In contrast, total overnight travel in Ontario declined over the same period by -0.6%.

- The decline in overnight cultural visits in Ontario since 1994 is attributable mainly to the decline in the number of these visitors from Ontario and other Canadian provinces (down in 1998 by 13.4% and 13.0%, respectively). US overnight cultural visits to Ontario increased over the same period by 3.4%, while overnight cultural visits to Ontario from overseas countries increased by 7.2%, notwithstanding the economic crisis that many overseas countries were experiencing in 1998. As a result of these differential growth rates, Ontarians' importance in the province's overnight cultural market declined from 43.2% of the trips in 1994, to 39.4% in 1998, the Americans' share increased from 33.1% to 36.1% and the overseas countries' share increased from 13.4% in 1994, to 15.1% in 1998.

- Southwestern Ontario, Festival Country, Lakelands, Getaway Country and Ontario's north experienced increases in overnight cultural visitors between 1994 and 1998, with Ontario's north experiencing the largest increase (41.2%). Unfortunately, two out of the three main cultural destinations in Ontario experienced declines in this market and as a result the province also experienced declines over the same period. Metro Toronto's overnight cultural visitors declined by -14.2% in 1998, over 1994, and Ontario's East overnight cultural visitors declined by –8.6%.

POINTS SAILLANTS

- En 1998, les visiteurs en provenance du Canada et du reste du monde qui ont été hébergés en Ontario et ont participé à des activités culturelles représentaient 16,5 % (6,5 millions de visites) de l'ensemble des visiteurs hébergés dans la province.

- Près de la moitié (48,8 %) des visiteurs hébergés en Ontario qui ont participé à des activités culturelles en 1998 venaient du Canada, plus d'un tiers (36,1 %) des États-Unis et 15,1 % des pays d'outre-mer.

- Le taux de participation aux activités culturelles de l'Ontario des visiteurs en provenance de l'Ontario, du Québec et du Manitoba était faible alors que celui des Américains et des visiteurs d'outre-mer était beaucoup plus élevé que celui des Ontariens. En conséquence, le pourcentage d'Américains et de visiteurs d'outre-mer hébergés en Ontario qui ont participé à des activités culturelles était beaucoup plus élevé que le pourcentage qu'ils représentaient de tous les visiteurs hébergés en Ontario. De façon générale, plus un visiteur venait de loin, plus il y avait de chances qu'il participe à des activités culturelles en Ontario.

- Le faible taux de participation des Ontariens aux activités culturelles de la province semble être le résultat d'un syndrome de « déjà vu » et du fait que les destinations que les Ontariens choisissent dans la province sont essentiellement des destinations de plein air, et non des destinations « culturelles ». Le faible taux de participation des résidents de la province aux activités culturelles n'était pas particulier à l'Ontario, mais était également observé parmi les résidents de tout le reste du Canada qui voyageaient dans leur propre province.

- En moyenne, les visiteurs hébergés en Ontario qui ont participé à des activités culturelles ont passé 4,52 nuits dans la province en 1998, soit 43,5 % de plus que la moyenne de tous les visiteurs hébergés dans la province (3,15 nuits). Comme on pouvait le prévoir, ce sont les visiteurs en provenance des pays d'outre-mer qui sont restés le plus longtemps (les visiteurs en provenance du Royaume-Uni et d'Allemagne faisant les séjours les plus longs), suivis par les Canadiens, puis les Américains.

- La très grande majorité des visiteurs en provenance des États-Unis et de l'Ontario qui ont été hébergés en Ontario et ont participé à des activités culturelles étaient venus pour une courte vacance (1-3 nuits).

- Bien que les visiteurs hébergés en Ontario qui ont participé à des activités culturelles aient représenté 16,5 % de l'ensemble des visiteurs hébergés en Ontario, ils restaient plus longtemps si bien qu'ils représentaient 23,7 % de toutes les nuits passées dans la province.

- Comparés aux autres visiteurs hébergés dans la province, les visiteurs hébergés en Ontario qui ont participé à des activités culturelles affichaient une fréquence de voyage beaucoup plus élevée en été et beaucoup plus faible en hiver et en automne. La majorité (50 %) des visiteurs qui sont venus en Ontario pour le plaisir ont voyagé dans la province pendant la période de juillet à septembre (3e trimestre).

- La plupart des visiteurs hébergés en Ontario qui ont participé à des activités culturelles (63,5 %)

sont venus dans la province essentiellement pour le plaisir. Cependant, un quart d'entre eux étaient venus en Ontario surtout pour rendre visite à des amis ou à de la famille et un peu plus de 10 % étaient en voyage d'affaires.

- Parmi les principaux marchés de visiteurs hébergés en Ontario qui ont participé à des activités culturelles, les Ontariens affichaient la plus haute fréquence de voyage en Ontario pendant le 1er trimestre civil (13,9 %), les visiteurs en provenance du Royaume-Uni la plus haute fréquence pendant le 2e trimestre civil (30,8 %), les visiteurs en provenance du Wisconsin la plus haute fréquence pendant le 3e trimestre civil (76,1 %) et les visiteurs en provenance de New-York la plus haute fréquence pendant le 4e trimestre civil (33,8 %). Les visiteurs en provenance du Canada représentaient le pourcentage le plus élevé de ces visiteurs pendant tous les trimestres civils, à l'exception du 4e trimestre où ils étaient à égalité avec les Américains.

- Parmi les visiteurs hébergés en Ontario qui ont participé à des activités culturelles, les personnes voyageant seules représentaient le pourcentage le plus élevé (42,9 %), suivies par des groupes de deux personnes (38,8 %). La fréquence de voyage sans compagnon était la plus faible parmi les visiteurs en provenance des États-Unis (seulement 28,1 % d'entre eux voyageaient seuls) et la plus élevée parmi les Canadiens (51,7 %).

- Les visiteurs hébergés en Ontario qui ont participé à des activités culturelles voyageaient pour la plupart sans enfants de moins de 15 ans. Les Allemands affichaient la fréquence la plus faible de voyage avec des enfants (5,9 %) et les visiteurs en provenance de l'Ohio la fréquence la plus élevée (24,5 %).

- Comparés aux autres visiteurs hébergés en Ontario, les visiteurs hébergés en Ontario qui ont participé à des activités culturelles affichaient une fréquence beaucoup plus élevée d'utilisation de logements commerciaux (34,9 % contre 27,6 % de leurs nuits/personne respectives), les Américains affichant la fréquence d'utilisation de logements commerciaux la plus élevée de tous les groupes de l'extérieur.

- Les visiteurs hébergés en Ontario qui ont participé à des activités culturelles étaient deux fois plus actifs que les autres visiteurs hébergés en Ontario, les visiteurs en provenance des pays d'outre-mer étant les plus actifs. La visite des lieux et le magasinage étaient des activités presque aussi populaires parmi eux que les activités culturelles.

- Les voyages qui amenaient en Ontario les visiteurs qui ont participé à des activités culturelles avaient essentiellement une orientation urbaine. La communauté urbaine de Toronto venait en premier et représentait la destination de 34,7 % de ces visiteurs. Le Pays des fêtes venait ensuite (28,3 % des visiteurs), suivie par l'Est ontarien (20,3 %).

- Les dépenses des visiteurs hébergés en Ontario qui ont participé à des activités culturelles représentaient 30,5 % du total des dépenses de tous les visiteurs hébergés en Ontario, soit 2,8 milliards de dollars. De plus, les visiteurs hébergés en Ontario qui ont participé à des activités culturelles affichaient une moyenne de dépenses par visite/personne qui était deux fois plus élevée que celle de tous les visiteurs hébergés en Ontario (425 $ contre 231 $).

- Les résidents de l'Ontario affichaient la moyenne de dépenses la plus faible par nuit passée en Ontario avec participation à des activités culturelles (186 $) ainsi que par personne/nuit (53 $).

La moyenne des dépenses des visiteurs en provenance des États-Unis par nuit passée en Ontario avec participation à des activités culturelles était deux fois plus élevée que celle des Ontariens (412 $) tandis que celle des mêmes visiteurs en provenance d'outre-mer était près de six fois supérieure à celle des Ontariens (1 120 $), en partie à cause du coût élevé des frais de voyage pour venir en Ontario.

- L'hébergement avec participation à des activités culturelles en Ontario a diminué de -7,9 % entre 1994 et 1996, puis augmenté de 3,2 % entre 1996 et 1998. Cependant, par comparaison avec 1994, le nombre de visiteurs hébergés en Ontario qui ont participé à des activités culturelles en 1998 était encore inférieure de -5 % (de 6,9 millions de visites en 1994 à 6,5 millions en 1998). Par contraste, le total des voyages avec hébergement en Ontario a décliné pendant la même période de -0,6 %.

- Le déclin de l'hébergement en Ontario avec participation à des activités culturelles depuis 1994 est essentiellement attribuable au déclin du nombre de visiteurs en provenance de l'Ontario et des autres provinces canadiennes (qui a baissé en 1998 de 13,4 % et 13,0 % respectivement). Le nombre des hébergements en Ontario avec participation à des activités culturelles a augmenté pendant la même période de 3,4 % pour les visiteurs en provenance des États-Unis et de 7,2 % pour les visiteurs en provenance des pays d'outre-mer en dépit de la crise économique que traversaient beaucoup de ces pays en 1998. En conséquence de ces taux de croissance différentiels, l'importance des Ontariens dans le marché de l'hébergement avec participation à des activités culturelles a chuté, passant de 43,2 % des voyages en 1994 à 39,4 % en 1998; la part des Américains a augmenté, passant de 33,1 % à 36,1 % ainsi que la part des visiteurs en provenance des pays d'outre-mer qui est passée de 13,4 % en 1994 à 15,1 % en 1998.

- Le Sud-Ouest de l'Ontario, le Pays des fêtes, la Région des lacs, le Pays de l'évasion et le Nord de l'Ontario ont affiché une croissance du nombre de visiteurs hébergés qui ont participé à des activités culturelles entre 1994 et 1998, le Nord de l'Ontario affichant l'augmentation la plus importante (41,2 %). Malheureusement, deux des trois principales destinations culturelles de l'Ontario ont affiché un déclin de ce marché, ce qui a entraîné un déclin de la province pendant la même période. Le nombre de visiteurs hébergés avec participation à des activités culturelles a baissé de -14,2 % dans la communauté urbaine de Toronto et de -8,6 % dans l'Est ontarien en 1998 par rapport à 1994.

INTRODUCTION

Definition: In this report a cultural tourist is defined as:

1. an international visitor to Ontario who:
   a. attended festivals or fairs, or
   b. attended cultural events, or
   c. visited zoo, museum or natural display
2. a domestic visitor with an Ontario destination who:
   a. attended festivals or fairs, or
   b. attended a cultural performance, or
   c. attended an aboriginal/native cultural activity, or
   d. visited a museum or art gallery, or
   e. visited a historic site

The information contained in this report was extracted from the micro data files of the Canadian Travel Survey (CTS) and the International Travel Survey (ITS) by Research Resolutions, on behalf of the Ontario Ministry of Tourism (OMTOUR).

Co-sponsored by all the provinces and the federal government, the CTS is conducted by Statistics Canada annually (starting in 1997) as a supplement to the Labour Force Survey. The CTS telephone interview captures the incidence and detail of travel by Canadians. In 1998, an average of 15,010 Canadian households -- including 4,276 Ontario households -- were surveyed every month throughout the year. The average response rate for Canadian and Ontario respondents was around 90%.

While up to 1994 only the name of a trip's destination was available from the CTS, as well as the name of the province where an overnight stop might have occurred en route to the trip's destination, starting in 1996 the complete trip itinerary was collected. As such, at the sub-provincial level, only visits with a destination in a specific region are comparable pre and post 1996 and not total domestic visits. In addition to the change in the location question, starting in 1996, the CTS captured the interview data on a CAI system, rather than on paper as was the case up to 1994.

The domestic data contained in this report differ from those reported in print or supplied in electronic format by Statistics Canada in the following ways:

1. All overnight trips, regardless of the distance travelled, and same day trips with a minimum one-way distance from a respondent's home of at least 40 kms are included in this report. Statistics Canada reports only trips of 80 kms and over.

2. Overnight trips with an Ontario destination, but no nights spent in the province, are treated in this report as same day trips to Ontario.

3. The domestic data contained in this report include visits in Ontario by Canadians while on trips to any destination, not just Canadian destinations.

Excluded from this report's domestic data are the following types of travel: travel as a member of an operating crew of a bus, plane, truck, etc.; commuting to and from work or school; one way travel involving a change of residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada; and trips longer than one year. A domestic trip must also meet a distance requirement as follows:

Length of Stay	PLACE OF RESIDENCE	
	Ontario	Other Canada
Same Day	40 Kms one-way from home	80 Kms one-way from home
Overnight	No minimum distance	No minimum distance

The ITS is also conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities who essentially conduct a census of border crossings and distribute the questionnaires to a sample of travellers. The questionnaires are self-completed by the travellers and mailed back to Statistics Canada. The questionnaire that is given to same day visitors from the United States who enter Canada by car does not contain any questions regarding the activities that these visitors engage in during their trip. This is the reason why we have limited our report to overnight visitors only.

The international statistics presented in this report are based on the census of US and overseas visitors as far as the number of travellers, their origin and the mode of transport are concerned. Most of the remaining trip characteristics were obtained from 12,534 completed questionnaires by US residents (out of 28,450 usable questionnaires of US visitors to Canada) and 6,302 completed questionnaires by overseas visitors (out of 11,567 usable questionnaires of overseas visitors to Canada).

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit.

2. Ontario does a number of imputations for missing values.

3. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

For more details on how Ontario manipulates the database, please write to the address below to obtain the technical appendix.

To aid the reader, a glossary of key terms used throughout this report is appended. For more information on this publication please contact:

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ONTARIO's OVERNIGHT CULTURAL TOURISTS - 1998

HOW MANY VISITORS AND WHERE DID THEY COME FROM?

In 1998, 107 million person visits were made in Ontario by same day and overnight visitors from across Canada and around the world. Those who stayed in Ontario for one or more nights accounted for 37.4% of this total, or for 40.0 million person visits. Of the overnight domestic visitors included in this total (30.3 million), 98.2%, or 29.8 million, visited Ontario as a destination, while the remaining 1.8% visited Ontario while en route to another destination.

Since the activities reported in the travel surveys are those that visitors engaged in during their trip, this report includes only the domestic overnight visitors with an Ontario destination to increase the likelihood that these activities occurred in Ontario. Unfortunately, the international visitors' trip destination is not collected in the international survey. As such, all of the overnight visits from overseas countries and the U.S. have been included in this report. Therefore, the total number of overnight visitors to Ontario that this report will utilise is 39.5 million and not 40.0 million, which includes domestic visitors with an overnight stop in Ontario, but destined to another province or country.

TABLE 1: Overnight Person Visits in Ontario, 1998

Origin of Visitors (000's)	All Visitors	Share (%)	Cultural Visitors	Share (%)
CANADA	29,759	75.4	3,189	48.8
Ontario	26,692	67.6	2,572	39.4
Quebec	1,666	4.2	256	3.9
Manitoba	452	1.1	61	0.9
Atlantic Canada	315	0.8	106	1.6
Western Canada	635	1.6	193	3.0
USA	7,860	19.9	2,358	36.1
Michigan	1,678	4.2	539	8.2
New York	1,511	3.8	478	7.3
Ohio	719	1.8	238	3.6
Pennsylvania	458	1.2	109	1.7
Illinois	396	1.0	86	1.3
Minnesota	310	0.8	36	0.6
Wisconsin	283	0.7	62	0.9
Other USA	2,505	6.3	811	12.4
OVERSEAS	1,866	4.7	987	15.1
UK	388	1.0	190	2.9
Japan	208	0.5	78	1.2
France	166	0.4	132	2.0
Germany	152	0.4	93	1.4
All Other	953	2.4	494	7.6

Of Ontario's 39.5 million overnight visitors, 16.5% or 6.5 million visitors participated in cultural activities.

Out of every twenty overnight cultural visitors who visited Ontario in 1998, eight came from Ontario (39.4%), seven from the U.S. (36.1%), three from an overseas country (15.1%) and two from a province other than Ontario (9.4%). With respect to the overnight cultural visitors from overseas countries, out of every twenty who visited Ontario in 1998, four came from the U.K. (19.5%), three from France (13.4%), two from Germany (9.4%) and two from Japan (7.9%).

A look at Table 1 reveals that Canadians accounted for a much lower share of Ontario's overnight cultural visitors than they did of the total overnight visitors to the province. This was due to the much

TABLE 2: Overnight Visitors' by Length of Stay in Ontario

Origin of Visitors	Average Number of Nights	
	All Visitors	Cultural Visitors
CANADA	2.83	3.90
Ontario	2.63	3.48
Quebec	2.79	3.41
Manitoba	4.22	5.72
Western Canada	8.24	7.51
Atlantic Canada	7.09	7.53
USA	3.11	3.27
Border States	2.84	2.82
New York	2.66	3.00
Michigan	2.42	2.43
Ohio	2.88	2.49
Pennsylvania	3.61	3.46
Minnesota	3.55	4.54
Illinois	3.37	3.47
Wisconsin	3.48	3.09
OVERSEAS	8.44	9.51
UK	8.74	10.00
France	5.58	5.70
Germany	8.74	9.34
Japan	3.18	3.41

lower participation rates in cultural activities of visitors from Ontario, Quebec and Manitoba. On the other hand, Americans (with the exception of visitors from Minnesota) and overseas overnight visitors accounted for a much higher share of Ontario's cultural visitors than they did of the province's total overnight visitors.

There are two implications emanating from the data presented in Table 1: First, since cultural activities occur mainly in urban centres, Canadian overnight visitors, especially the ones from Ontario, appear to take trips to Ontario that have more of an outdoor orientation, while Americans and overseas overnight visitors take trips to the province that appear to have more of an urban orientation.

Second, the further away a visitor to Ontario comes from, including visitors from Canada, the more likely this visitor is to participate in a cultural activity. Perhaps this phenomenon can be explained by the fact that Ontarians and their neighbours are familiar with the province's cultural product, especially since most of them reside in urban centres where most of this product is located.

A look at the incidence of participation in cultural activities among residents of other Canadian provinces reveals that this explanation may indeed apply to the rest of Canada and not just to Ontario. For example, 11.7% of the residents of Canadian provinces other than Ontario participated in cultural activities while on an overnight trip in their own provinces, as opposed to 9.6% for Ontarians. However, when Ontarians travel to other Canadian provinces on overnight trips, their participation rate in cultural activities jumps from 9.6% to 17.0%, while when residents of Canadian provinces other than Ontario visit Canada (other than their own province) their participation rate in cultural activities jumps from 11.7% to 22.1%. Although these numbers also indicate that the Ontarians' participation in cultural activities in Ontario is not as good as that of residents of other Canadian provinces, these figures are close enough to provide support to the conjecture that familiarity with one's own cultural product reduces participation in that activity.

An alternative, and/or supplementary, explanation of Ontarians' low participation rate in cultural activities in Ontario may revolve around the hypothesis that participation in cultural activities is not in general the main reason for taking a trip, but rather one of the many activities that visitors engage in while on a trip to a particular destination. Since Ontarians seek mainly outdoor destinations when they travel in Ontario (e.g., Simcoe, Muskoka) and since cultural activities are not readily available in those destinations, the Ontarians' low participation rate in cultural activities follows.

TABLE 3 Overnight Cultural Visits in Ontario by Calendar Quarter, 1998

Origin of Visitors	QI	QII	QIII	QIV
TOTAL	664	1,448	3,270	1,152
Share	*102%*	*22.2%*	*50.0%*	*17.6%*
CANADA (000)	421	629	1,635	504
Share	*63.4%*	*43.4%*	*50.0%*	*43.8%*
Ontario	359	481	1,330	402
Share	*54.1%*	*33.2%*	*40.7%*	*34.9%*
USA (000)	181	526	1,147	504
Share	*27.3%*	*36.3*	*35.1%*	*43.8%*
Border States	149	325	712	361
Share	*22.4%*	*22.4*	*21.8%*	*31.3%*
OVERSEAS (000)	62	293	488	144
Share	*9.3%*	*20.2%*	*14.9%*	*12.5%*
UK	8	58	96	27
Share	*1.2%*	*4.0%*	*2.9%*	*2.3%*
France	5	34	77	17
Share	*0.8%*	*2.3%*	*2.4%*	*1.5%*
Germany	7	24	46	17
Share	*1.1%*	*1.7%*	*1.4%*	*1.5%*
Japan	3	18	43	13
Share	*0.5%*	*1.2%*	*1.3%*	*1.1%*

HOW LONG DID THEY STAY IN ONTARIO?

Overall, Ontario's overnight cultural visitors stayed in the province much longer than other overnight visitors did (4.52 nights vs. 3.15 nights). As a result, although overnight cultural visitors accounted for 16.5% of all overnight visitors to Ontario, they accounted for 23.7% of all the person nights spent in the province in 1998.

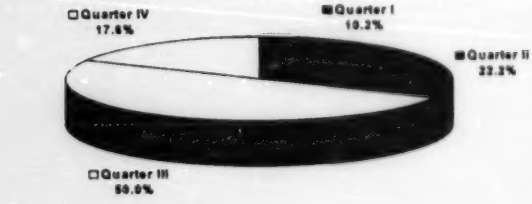
As expected, overnight visitors from overseas countries stayed the longest (with UK and Germany having the longest lengths of stay among overseas countries), followed by Canadians and then Americans - a rather surprising result since overnight visitors from the U.S. stay in general longer in Ontario than Canadians do.

Three out of every seven (44.6%) of Ontario's overnight cultural visitors stayed in the province for two nights or less and 63.7% stayed for three nights or less. Only 10.5% of Ontario's overnight cultural visitors stayed in the province for ten or more nights.

All Overnight Visitors

Overnight cultural visitors from the US had the highest incidence (74.1%) of taking a short getaway trip (3 nights or less) in the province, followed by Ontarians (72.6%) and overseas visitors (28.7%).

Overnight Cultural Visitors



WHEN DID THEY VISIT ONTARIO?

Compared to other overnight visitors, overnight cultural visitors had a much higher incidence of travel during the summer and a much lower incidence of travel during the remaining seasons.

The majority (50%) of Ontario's overnight cultural visitors travelled in the province during the July-September period (3rd quarter). This observation,

however, did not hold across all of Ontario's main markets. For example, the majority of the overnight cultural visitors from New York, Michigan, Pennsylvania, Minnesota the Atlantic provinces, western Canada and from overseas countries other than UK, France and Japan did not come to Ontario during the third calendar quarter.

Among Ontario's main overnight cultural markets, Ontarians had the highest incidence of travel in Ontario during the first calendar quarter (13.9%), U.K. visitors had the highest incidence of travel during the second calendar quarter (30.8%), Wisconsin visitors had the highest incidence of travel during the third calendar quarter (76.1%) and New York visitors had the highest incidence of travel during the fourth calendar quarter (33.8%). As Table 3 indicates, overnight cultural visitors from Canada accounted for the highest proportion of Ontario's overnight cultural visitors during all calendar quarters, with the exception of the fourth quarter where they were tied with the Americans.

WHAT WAS THE MAIN PURPOSE OF THEIR TRIP?

The majority (63.5%) of Ontario's overnight cultural visitors were visiting the province primarily for pleasure. However, a significant portion of them was in the province primarily to visit their friends or relatives (25.6%) and about ten percent were in Ontario for business or other personal reasons (7.6% for business and 3.4% for personal reasons).

As Table 4 demonstrates, the proportion of cultural visitors who visited the province for pleasure varied considerably among the various origin groups, with cultural visitors from the U.S. states bordering the Great Lakes having the highest incidence of pleasure travel and overseas cultural visitors having the lowest.

Cultural visitors from a province other than Ontario or Quebec had the highest incidence of VFR travel, while overseas cultural visitors had the highest incidence of business travel.

Among Ontario's main overseas markets, France had the highest proportion of overnight cultural visitors who came to Canada for pleasure (73.5%), UK had the highest proportion of cultural visitors who came to Canada primarily to visit friends or relatives (38.6%) and Japan had the highest proportion of cultural visitors who came to Canada primarily for business (19.0%).

Table 4: Overnight Cultural Visits in Ontario by Main Purpose and Origin, 1998

Origin of visitors	Main Purpose of Trip			
	Pleasure	Visit Friends/ Relatives	Business	Personal/ Other
TOTAL (000's)	4,148	1,672	494	221
Share	63.5%	25.6%	7.6%	3.4%
CANADA (000's)	1,893	1,031	161	104
Share	59.4%	32.3%	5.0%	3.3%
Ontario (000's)	1,621	792	75	83
Share	63.0%	30.8%	2.9%	3.2%
Quebec (000's)	165	72	10	9
Share	64.5%	28.1%	3.9%	3.5%
Other Canada (000's)	107	167	76	12
Share	29.6%	46.1%	21.0%	3.3%
USA (000's)	1,748	331	198	82
Share	74.1%	14.0%	8.4%	3.5%
Border States (000's)	1,259	187	61	41
Share	81.3%	12.1%	3.9%	2.6%
New York (000's)	379	72	15	12
Share	79.3%	15.1%	3.1%	2.5%
Michigan (000's)	446	56	17	20
Share	82.7%	10.4%	3.2%	3.7%
Other USA (000's)	489	144	137	40
Share	60.4%	17.8%	16.9%	4.9%
OVERSEAS (000's)	507	310	135	35
Share	51.4%	31.4%	13.7%	3.5%
UK (000's)	102	73	7	7
Share	54.0%	38.6%	3.7%	3.7%
France (000's)	97	24	8	3
Share	73.5%	18.2%	6.1%	2.3%
Germany (000's)	60	27	6	0
Share	64.5%	29.0%	6.5%	0.0%
Japan (000's)	44	14	19	0
Share	57.1%	18.2%	24.7%	0.0%
All other (000's)	203	172	94	25
Share	41.1%	34.8%	19.0%	5.1%

WHAT WAS THE SIZE AND COMPOSITION OF THEIR TRAVEL PARTY?

The largest proportion of the overnight cultural visitors in Ontario travelled alone (42.9%), followed by cultural visitors in travel parties of two (38.8%). The incidence of travelling with no companions was the lowest among American overnight cultural visitors (only 28.1% of the American overnight cultural visitors travelled alone in Ontario) and the highest among Canadians (51.7%).

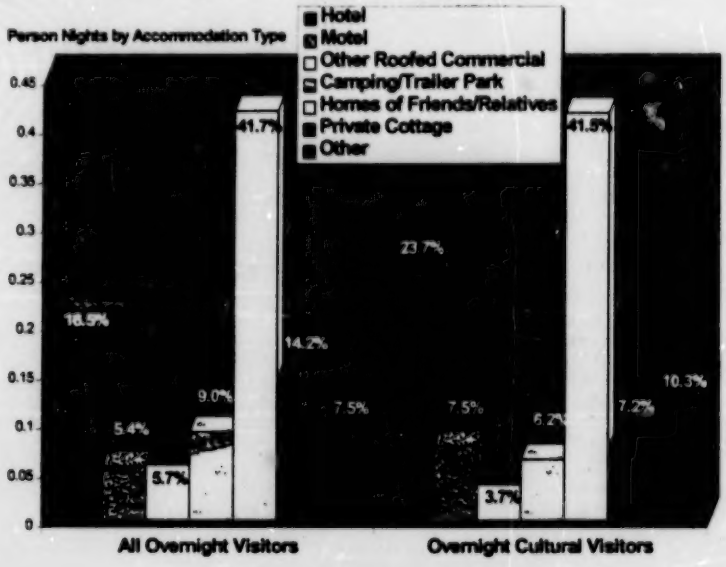
Twenty-five out of every thirty travel parties (83.6%) who engaged in cultural activities while on an overnight trip travelled in groups comprised of adults only, and about five-in-thirty (16.4%) travelled with children under the age of 15. Of those travelling in adult parties, 49.6% travelled in groups comprised of one adult, 44.7% travelled in groups comprised of two adults and 5.7% in groups comprised of three or more adults.

The incidence of travel in groups comprised of two adults only was the highest among overnight cultural visitors from Pennsylvania and New York (70.9% and 68.1%, respectively).

Relative to other groups, Ontarians and other Canadians, had a low incidence of travel in groups comprised of two adults only (28.7% and 24.0%, respectively) and the highest incidence of travelling alone (49.7% and 59.1%, respectively), while Ontarians had the third highest incidence of travelling with children (19.8%), after Ohio (24.5%) and Wisconsin (22.0%).

WHAT TYPE OF ACCOMMODATION DID THEY USE?

Compared to other overnight visitors, overnight cultural visitors had a higher incidence of utilisation of commercial roofed accommodation (34.9% vs. 27.6% of their respective person nights were spent in commercial roofed accommodation) and a lower incidence of utilisation of non-commercial accommodation (48.68% vs. 55.9% of their respective person nights). They also had a much higher incidence of utilization of hotels (23.7% vs. 16.5%) and, as expected, a lower incidence of utilisation of camping/trailer parks (6.2% vs. 9.0%).



Origin of Visitors	Average Party Size (persons)	Party Composition	
		Adults only	Adults with Kids
CANADA	1.78	81.1%	18.9%
Ontario	1.84	80.2%	19.8%
USA	2.18	85.3%	14.7%
Border States	2.31	83.8%	16.2%
OVERSEAS	1.92	90.3%	9.4%
UK	1.97	90.7%	9.2%
France	1.99	89.4%	10.6%
Germany	2.00	94.1%	5.9%
Japan	1.87	92.6%	7.4%

These observations varied considerably among overnight cultural visitors from different origins. For example, 25.5% of the Canadian overnight cultural visitors used roofed commercial accommodation, 10.6% used campgrounds and 58.3% used non-commercial accommodation, such as the homes of friends/relatives, or private cottages. On the other hand, 58.3% of the overnight cultural visitors from the U.S. used commercial roofed accommodation, 3.6% used campgrounds and only 24.7% used the homes of friends or relatives, or private cottages. Overnight cultural visitors from overseas countries had an incidence of utilisation of accommodation types similar to that of Canadians with the exception of campgrounds where they exhibited the lowest utilisation rate among all origin groups (2.4%).

TABLE 6 Overnight Visitors to Ontario
Participation by Activity, 1998

Activity	All Visitors %	Cultural Visitors %
Visit friends/relatives	56.7	49.7
Attend festivals/fairs	4.8	28.8
Attend cultural events	12.9	74.3
Attend sports events	5.9	8.9
Shopping	34.3	68.5
Sightseeing/cruising	29.6	68.8
Nightlife/entertainment	10.4	22.1
Visit theme parks	3.6	11.8
Visit parks or historic sites	13.6	45.8
Participate in outdoor activities	38.0	38.5

WHAT ELSE DID THEY DO IN ONTARIO?

Overnight cultural visitors were twice as active as other overnight visitors participating, on average, in 4.2 of the activities listed in Table 6, as opposed to 2.1 activities for the overall overnight visitors. Visiting friends or relatives was the only activity where overnight cultural visitors had a lower incidence of participation in when compared to other overnight visitors.

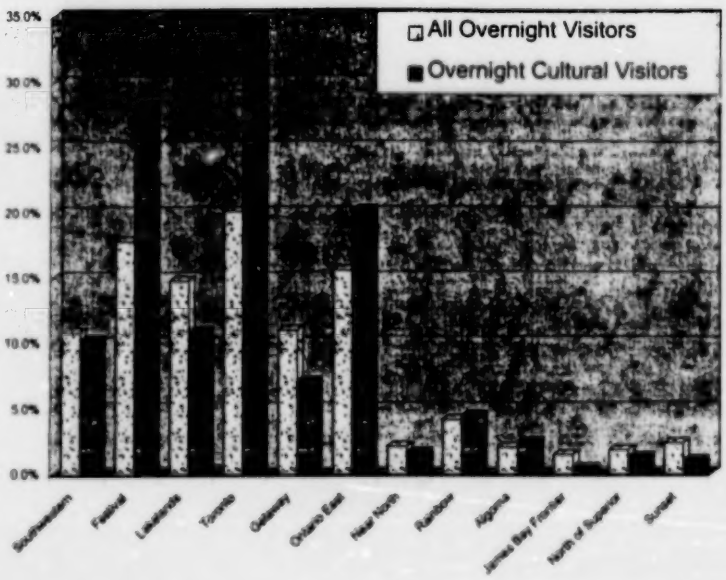
TABLE 7 Cultural Visitors to Ontario
Participation in Selected Activities, 1998

Activity	Origin of Overnight Cultural Visitors			
	Canada	Ontario	USA	Overseas
Visit friends/relatives	62.3%	60.1%	27.6%	61.9%
Attend festivals/fair	36.7%	37.4%	20.9%	21.8%
Attend cultural events	57.4%	54.3%	89.1%	93.4%
Attend sports events	8.5%	7.8%	7.6%	13.3%
Shopping	56.9%	56.4%	74.8%	90.6%
Sightseeing	60.1%	57.4%	72.2%	89.0%
Nightlife/entertainment	17.4%	16.7%	25.3%	29.9%
Visit theme parks	10.0%	8.6%	8.0%	27.0%
Visit parks or historic sites	39.0%	37.9%	46.3%	66.9%
Participate in outdoor activities	49.9%	51.7%	26.3%	30.9%

Naturally, attending cultural events was the most popular activity among overnight cultural visitors, followed closely by sightseeing and shopping. This observation adds support to the conjecture that

cultural activities was not, by and large, the main reason for bringing these visitors to Ontario.

Overnight cultural visitors from Ontario were much more inclined to participate in outdoor activities than the corresponding visitors from the U.S., or overseas countries (51.7% of Ontarians did so as opposed to 26.3% of Americans and 30.9% of overseas overnight cultural visitors).



On the other hand, Americans and overseas cultural visitors were much more inclined to go sightseeing, to go shopping, to engage in nightlife/entertainment and to visit parks and historic sites. Surprisingly, overnight cultural visitors from overseas countries had one of the highest incidences of visiting friends or relatives and the highest incidence of visiting a theme park (the latter is surprising because overnight cultural visitors from overseas countries had the lowest incidence of travel with children under the age of 15).

Overnight cultural visitors from overseas countries were the most active, participating, on average, in 5.3 activities, while those from the U.S. and Ontario participated, on average, in 4.0 and 3.9 activities, respectively.

WHICH ONTARIO REGIONS DID THEY VISIT?

As the chart on the next page demonstrates, Metro Toronto's dominance in the overnight market increased significantly among overnight cultural visitors as the region accounted for 34.7% of them. Toronto was followed by Festival Country (28.3%) and Ontario East (20.3%). Compared to their presence in the total overnight market, these three regions along with Rainbow Country and Algoma Country were the only ones that experienced an increased in their share of overnight cultural visitors, with Toronto experiencing the largest increase (up by 71.8%).

It was conjectured earlier, that overnight cultural visitors, when compared to other overnight visitors, appear to have more of an urban orientation. The data presented in this section provide additional support to that conjecture.

Metro Toronto was the most popular region among overnight cultural visitors from overseas countries and Canadian provinces other than Ontario, the second most popular region among

American overnight cultural visitors and the third most popular region among Ontario residents (who favoured Lakelands).

Festival Country was the most popular region among overnight cultural visitors from the U.S., second in popularity among Canadian provinces other than Ontario and third among overnight cultural visitors from overseas countries.

Ontario East was the second most popular region for overnight cultural visitors from Canadian provinces other than Ontario, third among Americans and second among overnight cultural visitors from overseas countries.

Metro Toronto had the highest proportion of overnight cultural visitors from outside Ontario (78.6%), mainly because of visitors from the U.S. and overseas countries. It also had the most diversified cultural market in that its top four markets accounted only for 42.2% of its cultural visitors (as compared to Lakelands where one market only, Ontario, accounted for 72% of its cultural visitors).

TABLE 8 Overnight Cultural Visitors in Ontario, 1998

Region Visited	Percent of Overnight Pleasure Visitors, by Origin, Visiting each Ontario Travel Region*								
	Canada	Ontario	USA	Border States	Overseas	UK	France	Germany	Japan
Southwestern Ontario	9.0%	10.2%	14.8%	18.1%	3.7%	6.4%	0.6%	4.7%	0.0%
Festival Country	18.0%	18.8%	40.3%	42.0%	32.7%	36.3%	37.2%	41.1%	31.1%
Lakelands	17.5%	20.2%	3.4%	3.7%	7.8%	10.5%	3.9%	18.7%	0.4%
Metro Toronto	23.1%	18.8%	35.3%	31.8%	70.5%	70.9%	76.4%	66.5%	51.4%
Getaway Country	9.5%	10.3%	4.2%	2.4%	6.9%	10.2%	2.7%	9.0%	2.0%
Ontario East	20.3%	16.5%	13.4%	9.7%	36.6%	29.7%	58.1%	32.0%	39.6%
Near North	2.5%	2.9%	0.5%	0.3%	2.2%	1.4%	1.6%	9.3%	0.0%
Rainbow Country	6.1%	6.9%	3.2%	1.8%	2.6%	2.0%	0.5%	10.9%	0.0%
Algoma Country	2.1%	1.9%	3.7%	2.9%	1.3%	0.5%	0.0%	3.5%	3.6%
James Bay Frontier	0.8%	0.8%	0.2%	0.1%	0.3%	0.3%	0.0%	1.1%	0.0%
North of Superior	1.2%	0.8%	1.8%	1.4%	1.1%	0.8%	0.0%	2.1%	0.0%
Sunset Country	1.5%	0.8%	0.9%	0.7%	0.5%	0.4%	0.0%	0.3%	0.0%

* The percentages are based on the total number of visitors with a known regional destination in Ontario.

Overnight cultural visitors from overseas countries moved around the province much more than overnight cultural visitors from other origins, visiting on average 1.7 Ontario travel regions. Overnight cultural visitors from the U.S. visited on average, 1.2 travel regions and Canadians 1.1 regions. Overnight cultural visitors from Germany moved around the province the most, visiting on average 2.0 travel regions.

These observations seem to validate the data presented earlier on activities which showed that

overnight cultural visitors from overseas countries had the highest incidence of participation in sightseeing (89.0%), followed by Americans.

Five out of the twelve Ontario travel regions drew the majority of their overnight cultural visitors from Ontario, while overseas countries played somewhat of a role in Metro Toronto, James Bay Frontier, Near North, Ontario East, Getaway Country and Lakelands. The U.S. played a significant role in Southwestern Ontario and Festival Country.

HOW MUCH DID THEY SPEND IN ONTARIO?

The expenditures of overnight cultural visitors accounted for 30.5% of the total spending in Ontario by all overnight visitors, or almost double the proportion of trips that the overnight cultural visitors accounted for (16.5%). This implies that overnight cultural visitors spent more per person trip than other overnight visitors to Ontario did.

Although visitors from Ontario accounted for 34.8% of the total spending in Ontario by all overnight visitors, they only accounted for 17.2% of the spending of overnight cultural visitors. On the other hand, the proportion of the overnight cultural visitors' spending that was accounted for by visitors from the United States and overseas countries increased when compared to the proportion of the total overnight expenditures accounted for by visitors from these countries. In addition to Ontario, Quebec and Pennsylvania also saw a decline in their share of expenditures that they accounted for among overnight

TABLE 9: The Top Overnight Cultural Markets for each one of Ontario's Travel Regions, 1998

RegionVisited	% of a Region's Overnight Pleasure Visitors Coming from (Origin):	
Southwestern Ontario	Ontario (262,000)	39.0%
	Michigan (192,000)	28.6%
	Ohio (44,000)	6.5%
	Illinois (28,000)	4.2%
Festival Country	Ontario (485,000)	26.3%
	New York (213,000)	11.5%
	Michigan (185,000)	10.0%
	Ohio (139,000)	7.5%
Lakelands	Ontario (520,000)	72.6%
	Michigan (27,000)	3.8%
	Quebec (21,000)	2.9%
	Germany (17,000)	2.4%
Metro Toronto	Ontario (484,000)	21.4%
	New York (177,000)	7.8%
	Michigan (159,000)	7.0%
	UK (135,000)	6.0%
Getaway Country	Ontario (266,000)	56.7%
	Quebec (21,000)	4.5%
	UK (19,000)	4.1%
	Michigan (16,000)	3.4%
Ontario East	Ontario (424,000)	32.0%
	Quebec (111,000)	8.4%
	New York (77,000)	5.8%
	France (76,000)	5.7%
Near North	Ontario (74,000)	66.1%
	Germany (9,000)	8.0%
	Wisconsin (3,000)	2.7%
	Manitoba (3,000)	2.7%
Rainbow Country	Ontario (177,000)	59.8%
	Quebec (10,000)	3.4%
	Germany (10,000)	3.4%
	Ohio (8,000)	2.7%
Algoma Country	Ontario (48,000)	29.1%
	Wisconsin (14,000)	8.5%
	Manitoba (14,000)	8.5%
	Michigan (9,000)	5.5%
James Bay Frontier	Ontario (20,000)	62.5%
	Quebec (4,000)	12.5%
	New York (1,000)	3.1%
	Germany (1,000)	3.1%
North of Superior	Ontario (21,000)	23.6%
	Minnesota (11,000)	12.4%
	Manitoba (9,000)	10.1%
	New York (4,000)	4.5%
Sunset Country	Manitoba (25,000)	34.7%
	Ontario (19,000)	26.4%
	Minnesota (5,000)	6.9%
	Wisconsin (2,000)	2.8%

TABLE 10: Total Spending Assigned to Ontario from Overnight Visitors, 1998				
Visitors' Origin	All Overnight Visitors (000's)	Share	Overnight Cultural Visitors (000's)	Share
TOTAL	$9,103,784	100.0%	$2,775,586	100.0%
CANADA	3,999,151	43.9%	697,559	25.1%
Ontario	3,171,720	34.8%	478,351	17.2%
Quebec	319,015	3.5%	58,794	2.1%
USA	3,112,270	34.2%	972,407	35.0%
Michigan	446,926	4.9%	171,591	6.2%
New York	402,969	4.4%	151,465	5.5%
Ohio	226,794	2.5%	72,356	2.6%
Pennsylvania	$195,320	2.1%	51,024	1.8%
OVERSEAS	1,992,363	21.9%	1,105,620	39.8%
UK	472,883	5.2%	239,389	8.6%
France	114,414	1.3%	90,102	3.2%
Germany	146,350	1.6%	94,170	3.4%
Japan	$204,799	2.2%	86,888	3.1%

cultural visitors.

For overnight cultural visitors from Ontario and Quebec, the decline in their expenditure shares was a consequence of the fact that they accounted for a smaller proportion of overnight cultural visitors than they did of total overnight visitors. However, as Table 1 shows, that was not the case for the overnight visitors from Pennsylvania. They accounted for 1.2% of all overnight visitors, but for 1.7% of the overnight cultural visitors.

Table 11 shows the average spending per person visit, as well as per person-night, for all overnight visitors and compares these statistics to those of the overnight cultural visitors. Overall, overnight cultural visitors had an average spending per person visit of $425, as compared to an average of $231 for the general overnight visitor population. The overnight cultural visitors from Ohio and France were the only ones that experienced a decline in the average spending per person visit when this average is compared to that of all overnight visitors form these areas. All other countries/states presented in Table 11 experienced an increase.

Overnight cultural visitors from Ontario had the lowest average spending per person visit ($186), as well as per person-night ($53).

Overnight cultural visitors from the U.S. had an average spending per person visit that was over twice as large as that of Ontarians' ($412), while overseas overnight cultural visitors had an average spending per person visit that was six times higher than that of Ontarians' ($1,120), partly because of high transportation costs to reach Ontario.

On a per person-per-night basis, however, the difference between the average spending of overnight cultural visitors from Ontario and that of cultural visitors from overseas countries declined from being six times greater, to being double, while the difference between the average spending of overnight cultural visitors from Ontario and that of Americans increased slightly from being 2.2 times greater, to being 2.4 times greater.

It is interesting to note in Table 11, that on a per-person-per-night basis, overnight cultural visitors from the U.S. as a whole and overseas countries as a whole did not spend as much as other overnight visitors did. It was the longer length stay in Ontario that eventually contributed to a higher average spending per person visit for the overnight cultural visitors.

Overnight cultural visitors from Japan had the highest average spending per person per night, but it was the overnight cultural visitors from the U.K. that had the highest average spending per person visit. A consequence of the fact that cultural visitors from the U.K. stayed in Ontario three times as long as cultural visitors from Japan did.

TABLE 11: Overnight Visitors, 1998
Average Expenditures in Ontario

Origin of Visitors	All Overnight Visitors		Overnight Cultural Visitors	
	Average per Person	Average per Person-Night	Average per Person	Average per Person-Night
TOTAL	$231	$73	$425	$94
CANADA	$134	$47	$219	$56
Ontario	$119	$45	$186	$53
Quebec	$191	$69	$230	$67
USA	$396	$127	$412	$126
Michigan	$266	$110	$318	$131
New York	$267	$100	$317	$106
Ohio	$315	$110	$304	$122
Pennsylvania	$426	$118	$468	$135
OVERSEAS	$1,068	$127	$1,120	$118
UK	$1,219	$140	$1,260	$126
France	$689	$124	$683	$120
Germany	$963	$110	$1,013	$108
Japan	$985	$309	$1,114	$328

When the transportation costs are removed from the overnight cultural visitors spending, the ranking of the high yield markets changes somewhat. Although overnight cultural visitors from Japan continue to have the highest average spending per person per night and overnight cultural visitors from the U.K. continue to have the highest average spending per person visit, it is now the US border states that have the highest average spending per party-night and the second highest average spending per person-per-night after Japan (see Table 12).

Table 11 demonstrates that, when all expenditures are taken into account, the overnight cultural visitors from the U.K. constitute Ontario's highest yield segment in this market, followed by Japanese and Germans. However, one needs to look at the expenditures shares of each of these visitor groups to determine their value to the provincial economy and not just their average spending per person visit. This is done in Table 10.

According to this table, although the U.K., Germany, France and Japan maintained their importance within the overseas group, it was the Ontario residents that contributed the most to the total spending of overnight cultural visitors in the province, accounting for 17.2% of this spending. This share, however, was significantly lower than Ontario residents' share of the total expenditures incurred by all overnight visitors (34.8%). Ontario was followed by U.K., Michigan, New York,

Germany, France and Japan. At a national level, the U.S. accounted for the largest share of expenditures incurred by overnight cultural visitors, followed by Canada.

Table 12 demonstrates that the further away from Ontario an overnight cultural visitor's place of residence was, the higher the share of transportation expenditures and the lower the share of the items purchased locally in the province. Accommodation accounted for the largest share of the overnight cultural visitors' non-transport related spending in Ontario (33.8%), followed by food/beverage (27.4%).

Overnight cultural visitors from Japan and the United States, especially those from Ontario's Border States, had the highest share of non-transport related expenditures going to accommodation, partly because these visitors had the highest incidence of usage of commercial roofed accommodation. Overnight cultural visitors from the U.S. and Japan spent 64.9% and 65.8%, respectively, of their person nights in Ontario in commercial roofed accommodation, as compared to 25.8% for overnight cultural visitors from Ontario and 28.9% for those from overseas countries.

Overnight cultural visitors from overseas countries had the highest share of non-transport expenditures going to retail shopping and the lowest share among all origin groups going to recreation or entertainment. Again these observation imply that shopping is an important activity for the overnight cultural visitors from overseas countries. Finally, Canadians and Ontarians had the highest share of non-transport expenditures in Ontario going to food/beverage.

Overnight cultural visitors from Japan had the highest average spending on accommodation irrespective of the unit of measurement used (i.e., per person visit, per-person-night, per party visit and per party-night), while the overnight cultural visitors from the U.K had the highest average spending per person visit, as well as per party visit, on food/beverage. However, on a per person night basis it was the Japanese cultural visitors that had the highest average spending on food/beverage, while on a per party night basis, it was the cultural visitors from Ontario's Border States that had the highest average spending on food/beverage. Finally, overnight cultural visitors from Ontario's Border States had the highest average spending on recreation/entertainment on a per person night or party night basis, while those from the U.K. had the highest average spending on a per person visit or party visit basis (primarily because they stayed much longer in Ontario than any other visitor).

TABLE 12 How Overnight Cultural Visitors Spent their Non-transport Budget in Ontario by Origin, 1998

Item of Expenditure	Origin of Overnight Cultural Visitors							
	Canada	Ontario	USA	USA Border States	Over-seas	UK	Ger-many	Japan
Spending by overnight cultural visitors, excluding transport related expenditures (millions)	$571	$388	$821	$473	$679	$133	$61	$40
As a % of the overnight cultural visitors' total spending in Ontario	81.8%	81.0%	84.5%	90.3%	61.4%	55.4%	65.2%	46.2%
Average Spending								
Per person	$179	$151	$348	$306	$688	$700	$656	$513
Per person-night	$46	$43	$106	$108	$72	$70	$70	$151
Per party	$320	$278	$760	$707	$1,321	$1,371	$1,298	$976
Per party-night	$85	$83	$224	$252	$133	$132	$134	$248
Accommodation (millions)	$177	$116	$327	$190	$195	$38	$20	$20
As a % of the non-transport spending of overnight cultural visitors	31.0%	29.9%	39.8%	40.2%	28.7%	28.6%	32.8%	50.0%
Average Spending								
Per person	$56	$45	$139	$123	$198	$200	$215	$256
Per person-night	$14	$13	$42	$44	$21	$20	$23	$75
Per party	$99	$83	$303	$284	$379	$392	$426	$488
Per party-night	$26	$25	$89	$101	$38	$38	$44	$124
Food/Beverage (millions)	$199	$139	$201	$116	$168	$35	$16	$9
As a % of the non-transport spending of overnight cultural visitors	34.9%	35.8%	24.5%	24.5%	24.7%	26.3%	26.2%	22.5%
Average Spending								
Per person	$62	$54	$85	$75	$170	$184	$172	$115
Per person-night	$16	$16	$26	$27	$18	$18	$18	$34
Per party	$111	$100	$186	$173	$327	$631	$340	$220
Per party-night	$30	$30	$55	$62	$33	$35	$35	$56
Recreation/Entertainment (millions)	$91	$65	$146	$95	$99	$22	$8	$3
As a % of the non-transport spending of overnight cultural visitors	15.9%	16.8%	17.8%	20.1%	14.6%	16.5%	13.1%	7.5%
Average Spending								
Per person	$29	$25	$62	$61	$100	$116	$86	$38
Per person-night	$7	$7	$19	$22	$11	$12	$9	$11
Per party	$51	$47	$135	$142	$193	$227	$170	$73
Per party-night	$13	$14	$40	$51	$19	$22	$18	$19
Retail (millions)	$104	$67	$147	$72	$218	$38	$17	$8
As a % of the non-transport spending of overnight cultural visitors	18.2%	17.3%	17.9%	15.2%	32.1%	28.6%	27.9%	20.0%
Average Spending								
Per person	$33	$26	$62	$47	$221	$200	$183	$103
Per person-night	$8	$7	$19	$17	$23	$20	$19	$30
Per party	$58	$48	$136	$108	$424	$392	$362	$195
Per party-night	$15	$14	$40	$38	$43	$38	$37	$50

ONTARIO's OVERNIGHT CULTURAL MARKET: 1994, 1996 &1998

TABLE 13 Overnight Person Visits in Ontario

Year	Overnight Cultural Visitors (000's)	Rate of Change	Share of Total Overnight visitors	All Overnight Visitors (000's)	Rate of Change
1994	6,879	-	17.3%	39,709	-
1996	6,333	-7.9%	16.5%	38,328	-3.5%
1998	6,534	3.2%	16.5%	39,485	3.0%

*Only domestic visitors with an Ontario destination are included in this table and not all overnight visitors to Ontario from domestic origins.

Overnight cultural visits in Ontario decreased by –7.9% between 1994 and 1996, and then increased between 1996 and 1998 by 3.2%. However, compared to 1994, the number of overnight cultural visitors in Ontario in 1998 was still down by –5.0%.

In 1994, overnight cultural visitors accounted for 17.3% of all overnight visitors in Ontario. However, this share decreased in 1996 by 4.6% to 16.5% and it remained at that level in 1998.

As Table 14 demonstrates, overnight cultural visitors from Ontario were mainly responsible for this decline of overnight cultural visitors in Ontario. Compared to 1994, in 1998 the number of overnight cultural visitors from Ontario had declined by 13.4%, while the number of cultural visitors from a Canadian province other than Ontario had declined by 13.0%.
As a result of the differential growth rates of cultural visitors from different origins, the share of overnight cultural visitors from the U.S. and overseas countries increased between 1994 and 1998 from 33.1% and 13.4%, respectively, to 36.1% and 15.1%, respectively, while that of Ontarians' and other Canadians declined.

Southwestern Ontario, Festival Country, Lakelands, Getaway Country and Ontario's north experienced increases in overnight cultural visitors between 1994 and 1998, with Ontario's north experiencing the largest increase (41.2%). Unfortunately, two out of the three main cultural destinations in Ontario experienced declines in this market and as a result the province also experienced declines over the same period. Metro Toronto's overnight cultural visitors declined by -14.2% in 1998, over 1994, and Ontario's East overnight cultural visitors declined by –8.6%.

TABLE 14 Overnight Cultural Visitors in Ontario, by Origin

Year	Origin of Visitors								
	Total	Canada	Share	Ontario	Share	USA	Share	Overseas	Share
1994	6,879	3,678	53.5%	2,969	43.2%	2,280	33.1%	921	13.4%
1996	6,333	3,010	47.5%	2,482	39.2%	2,232	35.2%	1,091	17.2%
1998	6,534	3,189	48.8%	2,572	39.4%	2,358	36.1%	987	15.1%

As a result of these differential growth rates, Metro Toronto's share of Ontario's overnight cultural visitors declined in 1998, over 1994, from 38.3% to 34.7%, Ontario East's share declined from 21.0% to 20.3% and Festival Country's increased from 25.5% to 28.3%.

TABLE 15: Overnight Cultural Visitors in Ontario, by Region Visited

Year	Ontario Travel Region Visited						
	OTAP 1	OTAP 2	OTAP 3	OTAP 4	OTAP 5	OTAP 6	OTAPs 7-12
1994	608	1,757	640	2,641	361	1,448	454
1996	596	1,598	490	2,499	487	1,489	514
1998	672	1,846	716	2,265	469	1,324	641

GLOSSARY

ACCOMMODATION TYPE refers to the type(s) of accommodation used during the trip.

Other accommodation is a separate category in the CTS and ITS questionnaires, and includes dormitories, hostels, sleeping berths on trains and boats, etc. In many of the tabulations contained in this report, accommodation type "not stated" records have been combined with *other*.

ACTIVITIES ON TRIP. For each trip, respondents were asked to indicate whether they participated in any of a number of activities (aided measure). The activity could have occurred at any location on the trip (destination, location of overnight stop) since activity data are not captured on a location-specific basis.

EXPENDITURES ON TRIP. All dollars spent by all household members or party members who went on the trip and paid for by individuals, government or private sector business. Only expenditures incurred by visitors to Ontario are contained in this report. Spending by Ontarians on (Canadian) public fares for trips outside the province and with no visit in Ontario are not included here.

The following items of expenditures are excluded:

- food and beverage purchased prior to the trip to be used while on the trip;
- items purchased to be resold or used in a business;
- vehicles, such as cars, boats and caravans;
- capital investment, such as real estate, work of arts, rare articles and financial stocks;
- cash given to friends or relatives during a trip which does not represent payment for goods and services received, as well as donations to institutions.

EXPENDITURES IN ONTARIO. Canadian residents' expenditures on the trip are assigned by Statistics Canada to provinces of origin, destination, and location of overnight stops according to pre-set rules. Expenditures from the ITS were assigned to Ontario according to OMTOUR rules.

HOUSEHOLD/PARTY TRIP. A trip involving one or more persons from the same household/party leaving and returning together. If four persons from the same household take a trip, it counts as one household-trip.

The CTS captures household-based information, while the ITS captures party-based (not necessarily belonging to the same household) information.

MODE OF TRANSPORT. Mode of transport refers to the one used in Canada. It does not refer to the transport mode used by international visitors to come to Ontario.

PERSON NIGHT. A night spent away from home by a person taking a trip. If two persons take a trip involving three nights away from home, that counts for six person nights.

PERSON TRIP. A trip taken by one person. If two persons from the same household go on a trip, it counts for two person trips. If the same person takes two trips, it also counts for two person trips.

PURPOSE OF TRIP (MAIN). The main purpose categories include *visiting friends/relatives, pleasure, personal, business, convention*. In this report, *business convention* has been combined with *business* and *pleasure* has been combined with *non-business convention*.

QUALIFYING TRIP. A *qualifying trip* in the CTS is defined as travel from the usual place of residence to a location any distance away if an overnight trip and at least 40 km (one-way) if a same-day trip for any

purpose other than as a member of an operating crew of a bus, plane, truck, etc; commuting to work or school; moving to a new residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada and trips that longer than one year. The distance minimum of 40 km applies only to same-day trips that originate in Ontario. In all other provinces, the minimum distance for a same-day trip is 80 km. In the ITS it includes all non-residents crossing the Canadian border (excludes crews of transportation firms).

REPORTING PERIOD. An one month reporting period is used by the CTS since the second quarter of 1992. All fieldwork takes place approximately three weeks after the *end* of the reporting period. For example, during the third week in July respondents would be asked to report on trips that ended in preceding June. In the ITS, a respondent is given a questionnaire which he/she is asked to fill out when his/her trip is completed.

RESPONDENT. In the CTS, a randomly selected individual in the sampled household (from the Statistics Canada Labour Force Survey sampling frame) who is at least 15 years of age. Specifically excluded from the LFS coverage are residents of Yukon and Northwest Territories, persons living on Indian Reserves, full-time members of the Canadian Armed Forces and persons living in institutions (inmates of penal institutions and patients in hospitals or nursing homes who have resided in the institution for more than six months).

VISIT. Place of overnight stay or for same day trips, the location of the trip's destination. If the respondent travelled twice to the same location during the same trip, only one visit is recorded at that location. In this report there are three types of visits at the sub-provincial level: visits that were destined to region x; visits that were destined to Ontario region y, but took an excursion to region x, and visits that were destined outside Ontario, but had an overnight stop in region x. A small number of CTS respondents with overnight trips indicated that had as their destination Ontario region x, but they spent no night in region x. These trips have been treated in this report as same day trips to region x.

MAP OF ONTARIO'S TRAVEL REGIONS